



# OUR FUTURE YOUR LEGACY!



*Make Great Theatre a Part of Your Legacy*

**You can perpetuate your love of theatre through a legacy gift to support the ongoing programs of Curtain Call. Planned gifts to Curtain Call, Inc. qualify for the Federal Estate Tax Charitable Deduction.**

By including Curtain Call in your estate plans, you will be assuring your own legacy by securing the theatre's history for future generations. Planned giving allows you the satisfaction of contributing to the important, on-going, and future work of Curtain Call, while providing significant tax and financial benefits to you and your heirs. You can enjoy the benefits of recognition now and know that your legacy will provide artistic excellence for generations to come.

Planned giving helps you balance your charitable interests with your financial goals. Because certain types of planned giving can minimize estate and capital gains taxes, provide sizable income tax deductions as well as generate income streams, planned giving permits individuals to support their favorite charities while simultaneously obtaining financial benefits for themselves and other beneficiaries.

Once you match your objectives with the proper gifting vehicle, planned giving allows you the satisfaction of realizing your charitable intent, while continuing to implement the financial plans you have developed for yourself and your family. ***Given the numerous approaches to planned giving, Curtain Call encourages you to contact your own financial advisor or attorney for further advice, so that you can select the planned giving option that is perfect for you.***

### **BEQUESTS**

A donation in a will allows you to defer your gift until your death. This is the most common and simplest way to make a planned gift, with the help of your attorney.

Here are a few examples of how to word your bequest:

• I give, devise, and bequeath to Curtain Call, Inc., a not-for-profit corporation currently located in Stamford, Connecticut, all the rest, residue and remainder of my estate, both real and personal, to be accepted and used in the discretion of its Board of Directors.

• I give, devise, and bequeath to Curtain Call, Inc., a not-for-profit corporation currently located in Stamford, Connecticut, \_\_\_ percent of the rest, residue and remainder of my estate, both real and personal, to be accepted and used in the discretion of its Board of Directors.

• I give, devise, and bequeath to Curtain Call, Inc., a not-for-profit corporation currently located in Stamford, Connecticut, the sum of \_\_\_ to be accepted and used in the discretion of its Board of Directors.

### **LIFE INSURANCE**

A planned gift of life insurance is another way that you can make a donation to Curtain Call. Along with the help of your attorney you can decide how much you would like to donate, and determine if you will use an old policy or simply create a new one.

### **GIFTS OF APPRECIATED SECURITIES**

Making special donations of stocks or bonds. Contributing your appreciated securities to Curtain Call will give you an immediate charitable deduction for the full present fair market value with no capital gains tax on the appreciation. Curtain Call has an account with Charles Schwab and Company to accept both cash and appreciated assets.

One of the greatest benefits to becoming a member of the **Legacy Circle** is your official agreement to support the continuing efforts of Curtain Call, Inc., by making a contribution towards the future entertainment and education of many generations to come.

### **As a member of Curtain Call's Legacy Circle**

- Public acknowledgement
- Listing in Playbill as a member of the **Legacy Circle**
- Invitation to an exclusive annual recognition event for the **Legacy Circle**
- Dinner and Backstage tour by special arrangement with Executive Director

### **Contact Us for Further Information on Planned Giving**

If you are interested in becoming a member of Curtain Call, Inc.'s **Legacy Circle** or if you would like to learn more about the different ways that you can contribute, please contact: Lou Ursone, Executive Director at 203.329.8207.

## **Make a Gift Tax-Free With an IRA ... A Tax-Saving Way to Help Curtain Call, Inc.**

Make a difference today and save on taxes. It's possible when you support Curtain Call through your IRA.

### **A Special Opportunity for Those 70½ Years Old and Older\***

You can give any amount (up to a maximum of \$100,000) per year from your IRA directly to a qualified charity such as Curtain Call without having to pay income taxes on the money. Gifts of any value \$100,000 or less are eligible for this benefit and you can feel good knowing that you are making a difference at Curtain Call. This popular gift option is commonly called the IRA charitable rollover, but you may also see it referred to as a qualified charitable distribution, or QCD for short.

### **Why Consider This Gift?**

- Your gift will be put to use today, allowing you to see the difference your donation is making.
- Beginning in the year you turn 73\*, you can use your gift to satisfy all or part of your required minimum distribution (RMD).
- You pay no income taxes on the gift. The transfer generates neither taxable income nor a tax deduction, so you benefit even if you do not itemize your deductions.

Since the gift doesn't count as income, it can reduce your annual income level. This may help lower your Medicare premiums and decrease the amount of Social Security that is subject to tax.

*\*Depending on your birth year - check with the your tax advisor or IRS for details.*

## **MEMORIAL REQUESTS**

Another great way to support Curtain Call after you're gone is to direct friends and family to make memorial contributions in your honor. Gifts of any amount are greatly appreciated and are a way for people to show their respect for you while helping an organization that you believe in.

## **JOIN THE LEGACY CIRCLE**

**Planned Giving  
is like a football game:  
YOU KICK OFF  
and WE RECEIVE.**

### **DISCLAIMER:**

Curtain Call does not provide legal or tax advice. Contact an attorney or tax professional regarding your specific situation. As tax laws and regulations can change, please verify all information with your legal and tax professionals.